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Food Processing Ingredients Sector

Japanese Food Processing Sector Report 2005

2005

Approved by:

Emiko Purdy, Director, ATO/Osaka
American Consulate, Osaka-Kobe, Japan

Prepared by:

Market Makers Inc., and U.S. Agricultural Trade Office, Osaka

Report Highlights:

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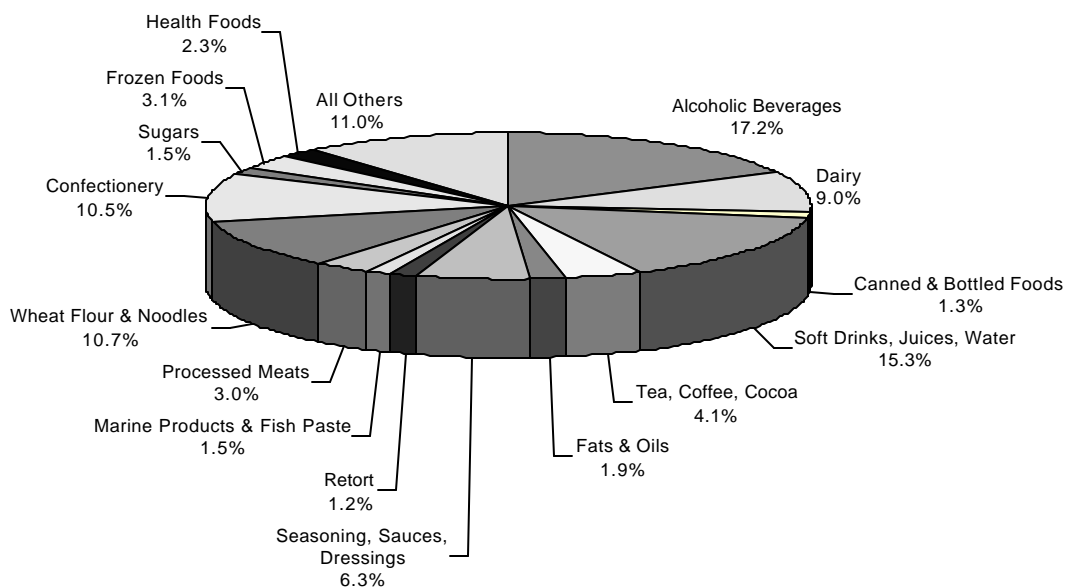
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JAPANESE FOOD PROCESSING SECTOR REPORT

I. MARKET SUMMARY

The value of the Japanese food processing industry, including beverages, was estimated at US\$208.6 billion (22.5 trillion yen, at \$1=108.2 yen) in 2004 on an FOB plant basis.

Japan Food Processing Industry Sub-Sectors*



Value basis – 2004

Source: Shurui Shokuhin Tokei Geppo, January 2005

It is estimated that there are over 40,000 companies in the food processing industry, many quite small, employing over 1 million workers in total.

Due to a lack of arable farmland and high production costs, Japan has historically been a major importer of agricultural products for use in further processing. The United States is the largest supplier of agricultural products to Japan with imports from the U.S. totaling \$12.7 billion in 2004 representing 30% share of the Japan's total imports, followed by China's 12 % and Australia's 11% share.

Key market drivers for the food processing sector include:

- Deflationary economic environment over the past decade, causing processors to seek out lower cost food inputs to remain competitive.
- Heightened consumer and retailer concerns for food safety as a result of food scares over the past decade forcing processors to have higher standard of quality assurance and the traceability system.
- Continuing internationalization of the Japanese diet, and growing popularity of “ethnic foods” from outside of Japan.
- Increasing emphasis on convenience and ready-to-eat food.
- Increasing interests in health and functional foods, especially as the Japanese population ages.

Some of key advantages and challenges for U.S. food products include:

Advantages	Challenges
The U.S. has a reputation as a reliable supplier of food inputs in terms of availability and delivery.	Consumers perceive Japanese food production safer than production overseas including the United States.
High Japanese farming costs make imported food products price-attractive.	The perception of U.S. price competitiveness and quality has declined vis-à-vis other exporting nations among Japanese buyers.
U.S. food products have a better image compared to other countries, especially China and S.E. Asia, particularly for safety issues.	Higher costs for U.S. exports due to high labor costs relative to Asian producers are making products less competitive in price.
The expansions of U.S. fast food chains help introduce U.S. food products into the general diet.	Tighter Japanese government regulatory enforcement is increasing the amount of documentation and testing required for imports.

II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

Strategies for entering the Japanese market will vary depending on the type of agricultural product and on the competitive environment. New U.S. exporters to the Japanese market are recommended to consider the following steps:

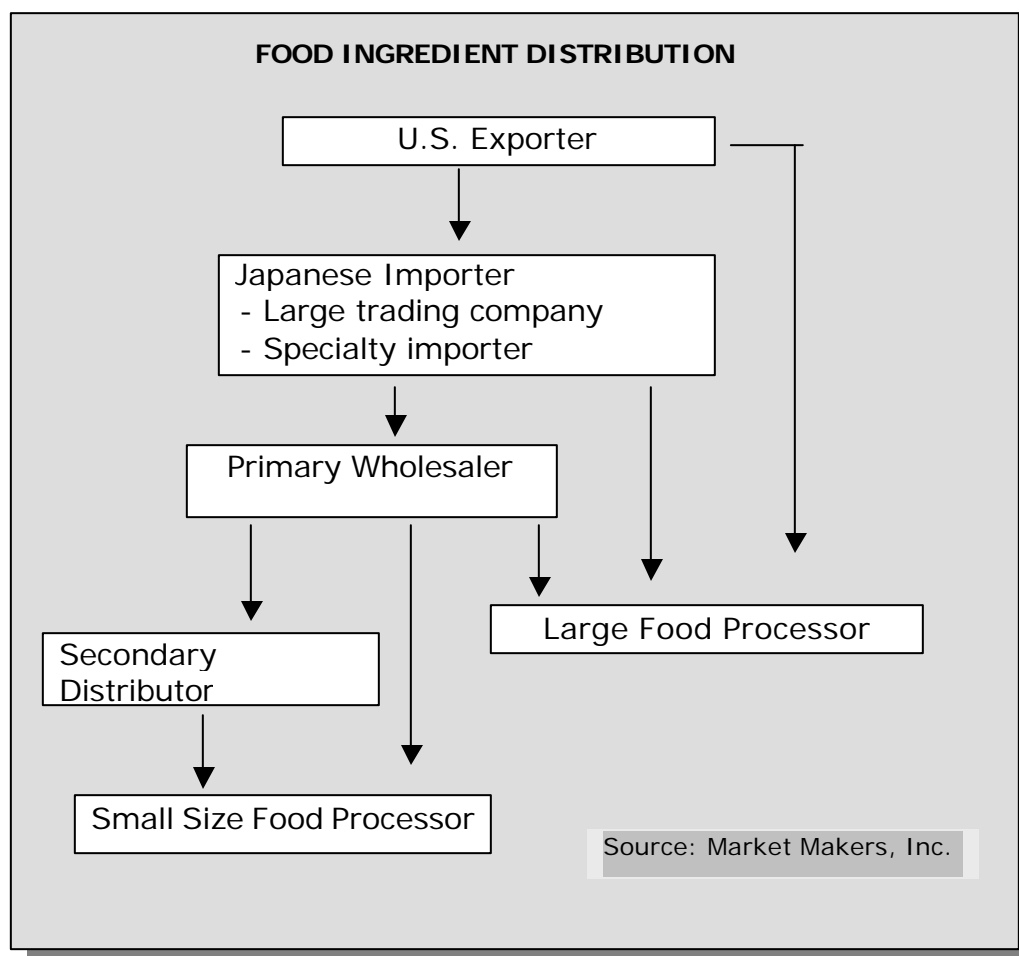
1. Visit Japan to explore opportunities firsthand.
2. Meet with Japanese importers who handle the types of products that you carry to learn more about the competitive environment.
3. Perform some basic market research to determine whether your products can be price competitive or not. It is important to determine whether your products can compete against foreign competitors.
4. Review Japanese food regulations to determine if your products comply with local laws regarding additives, residues and processing procedures. Information relates to additives and ingredients can be found in the USDA/FAS GAIN Report, August JA 4063 “Japan Food and Agricultural Import Regulations and Standards 2004”.
The Government of Japan is in the process of establishing a list of MRL (maximum residue levels) for a broad range of chemicals which is due to take effect in 2006. Potential new-to-market exporters should review the Provisional Lists of MRL’s. (found in USDA/FAS GAIN Report JA 4056 and JA 4067)
5. Visit potential customers to determine if there is interest in your product, and determine how they normally source products.
6. Determine the comparative advantage of your products. Potential customers need to be convinced of the merit of using your products. Typical benefits include price savings, higher quality, higher value added, or more convenient packaging.
7. Be willing to make changes to the product if necessary to meet market requirements. This includes a willingness to re-formulate to comply with Japanese food laws, and to tailor packaging to the marketplace.
8. Understand how the Japanese distribution system works. Useful first steps for trade leads include participating in food shows and contacting sources such as freight forwarders for potential contacts.
9. When appointing agents, be sure your partner has a good reputation and track record in the market place.
10. Be aware that Japan is a very service oriented culture and requires quick response to both product complaints and requests for information.
11. Doing business for the first time in Japan requires patience. Orders normally start small to determine whether the product will meet market requirements.

B. MARKET STRUCTURE

Despite consolidation in the distribution channels in Japan, most imported food products still pass through trading companies. The large general trading companies have divisions specializing in a variety of food categories while smaller trading companies specialize in a limited number of products. Trading companies function as legal importers of the product, and serve a variety of functions, including financing the product, clearing customs, warehousing and order documentation.

In the past, trading companies would normally sell to first-line wholesalers and then the product would pass to secondary distributors. This pattern has changed in the past decade as companies seek to reduce costs. It is not uncommon now for food processors, especially the larger ones, to take possession directly of the product from the trading companies, or in some cases to even import directly themselves if the size of transactions makes this cost effective.

A flowchart of the product from the U.S. exporter into the market follows:



Food processors sell their products to a variety of sectors, including the Hotel, Restaurant, and Institution (HRI) sector, the retail sector and other food processors. The Japanese food market was estimated to be worth \$605 billion (\70.0 trillion) in 2002, composed of retail market with \$384 billion (\44.4trillion) including Home Meal Replacement (HMR), and HRI market with \$221 billion (\25.6 trillion).

C. COMPANY PROFILES

Below is a table with a profile ranking of the top 100 food processors in Japan. The table includes information on the company's annual sales, types of products sold, end-user channels, location, number of processing plants, and procurement channels used to purchase food inputs. In addition, the table provides a contact point for each of the food companies. In order to obtain a contact point, each company was directly contacted during the preparation of this report and asked to identify the preferred point of contact. Because many of the companies sell numerous different types of products and each different type of product (in some cases) has separate divisions and purchasing groups, some companies list the headquarter office as the initial point of contact. Others, which have centralized buying functions, list "Procurement Division", "Purchasing Dept." or "Materials Dept.". Still others, which have departments responsible for overseas or imported products, cite those as their preferred point of contact. All companies provided an address, and a phone number; most also provided a fax number; in a limited number of cases a personal e-mail was also included. However, due to the rapid change in job responsibilities, this latter option was not frequent. (Please note that when dialing from outside Japan, the country code "81" should be used and the first "0" in the area code should be deleted. When dialing within Japan, simply dial the number as listed in the chart except when dialing within the same area code, in which case the area code is not dialed, only the last 8-digits.)

Food Manufactures Top 100 List for ATO Research

Net sales: unconsolidated

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
1.	Asahi Breweries, Ltd. (Beer, Liquors & Wine.)	\$9.63 \1,106,977 (Dec. 2004)	Retail HRI	Japan (9) U.S.A. (1) China (6) Czech (1)	Importers Direct	1-23-1, Azumabashi, Sumida-ku, Tokyo 130-8602	Tel: 03-5608-5204 Fax: 03-5608-5205 Materials Dept., Raw Materials Div.
2.	Kirin Brewery Co., Ltd. (Beer, Liquors, Wine & Foodstuff.)	\$8.63 \961,830 (Dec. 2003)	Retail HRI	Japan (11)	Importers Direct	2-10-1, Shinkawa, Chuo-ku, Tokyo 104-8288	Tel: 03-5541-5318 Fax: 03-5541-5511 Materials Dept., Procurement Div.
3.	Suntory Ltd. (Liquor, Beer, Soft Drinks & Wine.)	\$6.66 \765,956 (Dec. 2003)	Retail HRI	Japan (17) U.S.A. (1) U.K. (1) France (6) Hungary (1) Germany (1)	Importers Direct	2-1-40, Dojimahama, Kita-ku, Osaka City 530-8203	Tel: 03-3470-1649 Fax: 03-3470-1705 Headquarters
4.	Kao Corporation (Oil, Dressing Sauces, Mayonnaise & Beverages.)	\$5.79 \665,914 (Mar. 2004)	Retail	Japan (7)	Importers Direct	1-14-10, Kayabacho, Nihombashi, Chuo-ku, Tokyo 103-8210	Tel: 03-3660-7111 (Contact to Tokyo Ingredient Dept.)
5.	Ajinomoto Co., Inc. (Amino Acids, Instant Bouillon & Sauces.)	\$5.73 \659,114 (Mar. 2004)	Retail HRI	Japan (3) Overseas (22 countries)	Importers Direct	1-15-1, Kyobashi, Chuo-ku, Tokyo 104-0031	Tel: 03-5250-8192 Fax: 03-5250-8277 Purchasing Dept.
6.	Nippon Meat Packers, Inc. (Beef, Pork, Chicken, Ham & Sausages, & Deli.)	\$5.28 \607,022 (Mar. 2004)	Retail HRI	Japan (8) U.S.A. (1) Mexico (1) Thailand (1) Australia (1)	Importers Direct	3-6-14, Minami-hommachi, Chuo-ku, Osaka City 541-0054	Tel: 06-6282-3154 Fax: 06-6282-1054 Production Control Dept., Ham & Sausages Business Div. Tel: 06-6282-3408 Fax: 06-6282-3307 Deli Products Business Dept. (Processed Foods)
7.	Yamazaki Baking Co., Ltd. (Breads, Japanese & Western Confectioneries, Jam, & Spread.)	\$4.92 \565,989 (Dec. 2003)	Retail HRI	Japan (26) U.S.A. (1) China (1) Taiwan (1) Thailand (1)	Importers Direct	3-10-1, Iwamotocho, Chiyoda-ku, Tokyo 101-8585	Tel: 03-3864-3091 Fax: 03-3864-3150 Purchasing Div.
8.	Meiji Dairies Corporation (Milk, Yogurt, Ice Cream, Butter, Cheese, Dessert, Drink, Dried Milk, Evaporated Milk, Beverages, Frozen Foods, Processed Foods, & Baby Foods.)	\$4.34 \498,747 (Mar. 2004)	Retail HRI	Japan (11) China (1) Thailand (1) Indonesia (1)	Importers Direct	1-2-10, Shinsuna, Koto-ku, Tokyo 136-8908	Tel: 03-5653-0346 Fax: 03-5653-0295 Purchasing Div.
9.	Morinaga Milk Industry Co., Ltd. (Milk, Dessert, Yogurt, Ice Cream, Drink,	\$3.97 \456,808 (Mar. 2004)	Retail HRI	Japan (9) U.S.A. (1) U.K. (1) France (1) Germany (2)	Importers Direct	5-33-1, Shiba, Minato-ku, Tokyo 108-8384	Tel: 03-3798-0220 Fax: 03-3798-0558 Material Dept.

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
	Ice Cream, Dried Milk, Cheese, Butter, & Baby Foods.)						
10.	Nisshin Seifun Group Inc. (Flours, Pastas, Pasta Sauces, Rehydratable Noodles, Frozen Foods, & Beverages.)	\$3.78 \434,125 (Mar. 2004) Consolidated	Retail HRI	Japan (12) U.S.A. (4) Canada (1) Thailand (4) Singapore (1) Indonesia (1) China (1)	Importers Direct	1-25, Kanda Nishikicho, Chiyoda-ku, Tokyo 101-8441	Tel: 03-5282-6351 Headquarters
11.	Kato Sangyo Co., Ltd. (Jam, Peanuts Butter Products, & Pasta.)	\$3.75 \431,432 (Sept. 2003)	Retail HRI	Japan (1)	Importers Direct	9-20, Matsubara-cho, Nishinomiya City, Hyogo 662-8543	Tel: 0798-33-7672 Fax: 0798-39-0597 Trade Div.
12.	Itoham Foods Inc. (Beef, Pork Chicken, Ham & Sausages, & Deli.)	\$3.59 \412,619 (Mar. 2004)	Retail HRI	Japan (6) U.S.A. (1)	Importers Direct	4-27, Takahata-cho, Nishinomiya City, Hyogo 663-8683	Tel: 03-5723-6210 Fax: 03-5723-2125 masahiko.saegusa@itoham.co.jp Import Planning Dept., Meat Div.
13.	Nichirei Corporation (Frozen & Retort Processed Foods, Chicken, Pork, Beef, & Fish.)	\$3.44 \396,145 (Mar. 2004)	Retail HRI	Japan U.S.A. (2) Netherlands (3) Netherlands Antilles (1) Brazil (2) Germany (1) Thailand (1) China (2) Australia (1)	Importers Direct	Nichirei Higashi Ginza Bldg., 6-19-20, Tsukiji, Chuo-ku, Tokyo 104-8402	Tel: 03-3248-2101 Headquarters
14.	Otsuka Pharmaceutical Co., Ltd. (Functional Foods, Functional Beverages, Supplements, & Milk Drink.)	\$2.91 \334,975 (Mar. 2004)	Retail	Japan (5) U.S.A. (1) China (3) Korea (1) Taiwan (2) Thailand (1) Indonesia (2)	Importers Direct	2-9, Kanda Tsukasamachi, Chiyoda-ku, Tokyo 101-0048	Tel: 06-6943-7755 Fax: 06-6943-7745 OtsukaFoods Co.,Ltd.
15.	Kirin Beverage Corporation (Coffee, Tea, Fruits Drinks, Vegetable Drinks, Water & Sherbet.)	\$2.86 \329,247 (Dec. 2003)	Retail HRI	Japan (2)	Importers	Kanda Izumicho Bldg, 1 Kanda Izumicho, Chiyoda-ku, Tokyo 101-8645	Tel: 03-5821-4025 Material Dept.
16.	Nippon Suisan Kaisha, Ltd. (Frozen & Chilled Seafood, Canned Foods, Retorts, & Frozen Deli.)	\$2.80 \321,915 (Mar. 2004)	Retail HRI	Japan (6) U.S.A. (2) Canada (1) China Vietnam (1) New Zealand (1)	Importers Direct	Nippon Bldg. 10F, 2-6-2, Otemachi, Chiyoda-ku, Tokyo 100-8686	Tel: 03-3244-7000 Headquarters
17.	Kyowa Hakko Kogyo Co., Ltd. (Seasonings, Amino Acids, Sauces, & Freeze Dry Seafood/Vegetables/Milk Products/Beef & Pork Processed	\$2.49 \285,867 (Mar. 2004)	Retail HRI	Japan (2) U.S.A. (2) China (3)	Importers Direct	Otemachi Bldg 5F, 1-6-1, Otemachi, Chiyoda-ku, Tokyo 100-8185	Tel: 03-3282-0145 Fax: 03-3211-1525 yasuyuki.shimizu@kyowa.co.jp Material G, Foods Logistics Center

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
	Products.)						
18.	Maruha Corporation (Frozen & Chilled Seafood, Canned Foods, Seafood Processed Foods, & Chilled Desserts.)	\$2.40 \274,414 (Mar. 2004) <i>unconsolidated</i>	Retail HRI	Japan (4) U.S.A. (5) Thailand (2) China (5)	Importers	1-1-2, Otemachi, Chiyoda-ku, Tokyo 100-8608	Tel: 03-3216-0821 Fax: 03-3216-0342 Communications & IR Group
19.	Nestle Japan Group (Coffee, Creams, Functional Foods, Chilled Foods, & Frozen Foods.)	\$2.37 \273,100 (Dec. 2003)	Retail HRI	Japan (3)	Importers	Nestle House, 7-1-15, Gokodori, Chuo-ku, Kobe 651-0087	Tel: 078-230-7097 Fax: 078-230-7169 Purchasing Dept., Supply Chain Management Div.
20.	Meiji Seika Kaisha, Ltd. (Confectioneries, Retort Soups & Curry, & Functional Foods.)	\$2.36 \271,951 (Mar. 2004)	Retail HRI	Japan (3) U.S.A. (2) China (1) Singapore (1) Indonesia (1)	Importers Direct	4-6-1, Hacchobori, Chuo-ku, Tokyo 104-8002	Tel: 03-3273-3391 Fax: 03-3273-2769 kiyoshi_nakao@meiji.co.jp Foods Import & Sales Dept.
21.	Q.P. Corporation (Mayonnaise, Dressings, Sauces, Jams, Canned Foods, & Health Foods.)	\$2.34 \268,958 (Nov. 2003)	Retail HRI	Japan (8) U.S.A. (2) China (2) Thailand (1)	Importers Direct	1-4-13, Shibuya, Shibuya-ku, Tokyo 150-0002	Tel: 03-3486-3357 Fax: 03-3486-3378 Overseas Div.
22.	Nisshin Food Products Co., Ltd. (Instant/Chilled/Frozen Noodles, Instant Soup, & Functional Foods.)	\$2.30 \264,868 (Mar. 2004)	Retail HRI	Japan (4) U.S.A. (3) Brazil (1) Netherlands (2) Germany (1) India (2) Indonesia (1) Thailand (1) Philippine (1) China (13)	Importers Direct	4-1-1, Nishinakajima, Yodogawa-ku, Osaka City 532-8524	Tel: 06-6305-7711 Headquarters
23.	ITO EN, LTD. (Tea, Coffee, & Fruit and Vegetable Beverages.)	\$2.05 \235,629 (Apr. 2004)	Retail	Japan (3) U.S.A. (2)	Direct	3-47-10, Hommachi, Shibuya-ku, Tokyo 151-8550	Tel: 03-5371-7111 Headquarters
24.	Katokichi Co., Ltd. (Frozen Foods, Frozen Seafood, & Frozen Noodles.)	\$1.98 \227,976 (Mar. 2004)	Retail HRI	Japan (8) China (8) Thailand (1) Indonesia (2)	Importers Direct	5-18-37, Sakamotocho, Kanonji City, Kagawa Pref. 768-8501	Tel: 0875-56-1161 Fax: 0875-56-1169 h-tsuda@katokichi.co.jp Overseas Div.
25.	Prima Meat Packers, Ltd. (Beef, Ham & Sausage, Meat Processed Foods, & Health Foods.)	\$1.92 \220,398 (Mar. 2004)	Retail HRI	Japan (4)	Importers	3-17-4, Higashi-Oi, Shinagawa-ku, Tokyo 140-8529	Tel: 03-5493-4500 Headquarters
26.	Lotte Co., Ltd.	\$1.86	Retail	Japan (6)	Importers	3-20-1,	Tel: 03-5388-5614

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
	(Gum, Chocolate, Cookies, Candy, Beverages, & Ice Creams.)	\213,500 (Mar. 2004)	HRI	U.S.A. (1) Philippine (1) Indonesia (1) Thailand (1) Korea China (2) Vietnam (1) Russia (1)	Direct	Nishishinjuku, Shinjuku-ku, Tokyo 160-0023	Fax: 03-3379-6809 Materials Dept., Production Div.
27.	Toyo Suisan Kaisha, Ltd. (Instant/Chilled/Frozen Noodles, Seafood, Chilled Foods, Frozen Foods, Ham and Sausage, & Canned Foods.)	\$1.85 \212,839 (Mar. 2003)	Retail HRI	Japan (6) U.S.A. (3) China (2) Taiwan (1)	Importers Direct	2-13-40, Konan, Minato-ku, Tokyo 108-8501	Tel: 03-3458-5081 Fax: 03-3458-8445 Materials Dept.
28.	The Nissin Oil Group, Ltd. (Cooking Oil, Dressings, Functional Foods, & Soy Milk.)	\$1.85 \212,819 (Mar. 2003) Consolidated	Retail HRI	Japan (2) China (3) Malaysia (1)	Importers Direct	1-23-1, Shinkawa, Chuo-ku, Tokyo 104-0033	Tel: 03-3206-5047 Fax: 03-3206-5250 Overseas Div.
29.	Starzen Co., Ltd. (Beef, Pork, Chicken, Ham and Sausage, & Meat Processed Foods.)	\$1.67 \192,299 (Mar. 2004)	Retail HRI	Japan (7) of a affiliate company	Importers Direct	2-5-7, Konan, Minato-ku, Tokyo 108-0075	Tel: 03-3471-5526 Fax: 03-3458-0659 Import Beef Dept., Overseas Div.
30.	Asahi Soft Drinks Co., Ltd. (Tea, Functional Beverages, Fruit Beverages, & Canned Coffee.)	\$1.65 \189,420 (Dec. 2003)	Retail HRI	Japan (4)	Importers Direct	1-23-1, Azumabashi, Sumida-ku, Tokyo 130-8602	Tel: 03-5608-5179 Materials Dept., Raw Materials Div.
31.	Coca-Cola National Beverage Co. (Beverages, Functional Beverages, & Functional Foods.) <i>*CCNBC will start on January 2005 as a raw procurement company of all Coca-Cola bottling companies in Japan.</i>	\$1.62 \186,176 (Dec. 2003) <i>Unconsolidated net sales of Coca-Cola West Japan.</i>	Retail	Japan	Direct	7-9-66, Hakozaiki, Higashi-ku, Fukuoka City 812-8650	Tel: 03-5466-8000 Coca-Cola (Japan) Co., Ltd. Headquarters
32.	Marudai Food Co., Ltd. (Beef, Pork, Chicken, Processed Foods, Chilled Dessert, Pizza, & Snacks.)	\$1.59 \183,136 (Mar. 2004)	Retail HRI	Japan (25) Overseas	Importers Direct	21-3, Midoricho, Takatsuki City, Osaka 569-8577	Tel: 072-661-2531 Fax: 072-661-2563 Materials Business Div.
33.	J-Oil Mills, Inc. (Cooking Oil, Fine Chemicals, & Health Foods.)	\$1.57 \180,914 (Mar. 2004) Consolidated	Retail HRI	Japan	Importers Direct	17F-19F, Seiroka Tower, 8-1, Akashicho, Chuo-ku, Tokyo 104-0044	Tel: 03-5148-7120 Fax: 03-5148-7128 Headquarters
34.	Nichiro	\$1.54	Retail	Japan (7)	Importers	1-12-1, Yurakucho,	Tel: 03-3240-6211

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
	Corporation (Canned Seafood, Retort Seafood, Frozen Foods, & Dessert.)	\177,093 (Mar. 2004)	HRI	U.S.A. (2) China (3) Thailand (1)	Direct	Chiyoda-ku, Tokyo 100-0006	Fax: 03-5252-7966 Headquarters
35.	Toyo Reizo Co., Ltd. (Frozen Seafood)	\$1.49 \171,000 (Mar. 2004)	Retail HRI	Japan (3)	Importers Direct	Shibusawa City Place Eitai 2F, 2- 37-28, Eitai, Koto- ku, Tokyo 135-0034	Tel: 03-5620-3200 Fax: 03-5620-3300 Materials Dept.
36.	Nippon Flour Mills Co., Ltd. (Pasta, Pasta Sauces, Flours, Frozen Foods, & Health Foods.)	\$1.39 \160,144 (Mar. 2004)	Retail HRI	Japan (8) U.S.A. (2) Thailand (2)	Importers Direct	5-27-5, Sendagaya, Shibuya-ku, Tokyo 151-8537	Tel: 03-3350-2311 Fax: 03-3356-5175 Materials Dept.
37.	House Foods Corporation (Curry Roux, Retort Roux, Snacks, & Functional Foods.)	\$1.39 \159,374 (Mar. 2004)	Retail HRI	Japan (5) U.S.A. (1) China (2)	Importers Direct	1-5-7, Mikuriya- Sakaemachi, Higashiosaka City, Osaka 577-0036	Tel: 06-6788-1151 Fax: 06-6788-1270 Materials Dept.
38.	Dainippon Pharmaceutical Co., Ltd. (Health Foods)	\$1.37 \157,783 (Mar. 2003)	Retail	Japan (1)	Importers Direct	2-6-8, Doshomachi, Chuo-ku, Osaka City 541-8524	Tel: 06-6203-5306 Fax: 06-6203-0059 Purchasing Dept.
39.	Yakult Honsha Co, Ltd. (Milk Products, & Functional Foods.)	\$1.37 \157,466 (Mar. 2004)	Retail	Japan (5) Brazil Korea Mexico Australia Netherlands Belgium U.K. Germany Argentina Malaysia	Importers Direct	1-1-19, Higashi- Shimbashi, Minato- ku, Tokyo 105-8660	Tel: 03-3574-8971 Fax: 03-3574-7253 Procurement Dept.
40.	Morinaga & Co., Ltd. (Chocolate, Candy, Snacks, Cookies, Ice Creams, & Functional Foods.)	\$1.30 \149,566 (Mar. 2004)	Retail HRI	Japan (5) China (1) Taiwan (1)	Importers Direct	5-33-1, Shiba, Minato-ku, Tokyo 108-8403	Tel: 03-3456- 0134Fax: 03-3456- 1809 International Dept.
41.	Toho Co., Ltd (Coffee, & Processed Foods.)	\$1.28 \147,535 (Jan. 2004)	Retail HRI	Japan (4)	Importer Direct	5-9, Koyochi-nishi, Higashinada-ku, Kobe City 658-0033	Tel: 092-622-6656 Fax: 092-622-6715 yoichi.ikeda @to-ho.co.jp Trade Div.
42.	Mizkan Group Co., Ltd. (Vinegar, Seasoning Sauces, & Chilled Foods.)	\$1.26 \145,300 (Feb. 2004)	Retail HRI	Japan (10) U.S.A. (1) Thailand (1) U.K. (1)	Importer Direct	2-6, Nakamuracho, Handa City, Aichi 475-8585	Tel: 0569-24-5101 Fax: 0569-24-5004 Overseas Business Management Div.
43.	Shikishima Baking Co., Ltd. (Breads, Japanese & Western Confectioneries.)	\$1.25 \143,669 (Aug. 2002)	Retail HRI	Japan (10) U.S.A. (1) China (1)	Importer Direct	5-3, Shirakabe, Higashi-ku, Nagoya City 461-8721	Tel: 052-933-2111 Headquarters
44.	Snow Brand Milk Products Co., Ltd.	\$1.19 \136,656 (Mar. 2004)	Retail HRI	Japan (9) Australia (1) France (1)	Importers Direct	13 Honshiocho, Shinjuku-ku, Tokyo 160-8575	Tel: 03-3226-2285 Fax: 03-3226-2108 FCM Promotion

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
	(Butter, Cheese, Powder Milk, Dressings, Sauces, & Retort Soups.)			China (2) Taiwan (1) Thailand (1)			Dept.
45.	Kyokuyo Co., Ltd. (Processed Seafood, Frozen Foods, & Canned Foods.)	\$1.18 \135,837 (Mar. 2004)	Retail HRI	Japan	Direct	Kokusai Sanno Bldg., 3-3-5, Akasaka, Minato-ku, Tokyo 107-0052	Tel: 03-5545-0739 Fax: 03-5545-0742 shinichi_tonochi@kyokuyo.co.jp hidetoshi_hashino@kyokuyo.co.jp Business Management Dept.
46.	Ezaki Glico Co., Ltd. (Ice Cream, Retort Foods, Cereals, Functional Foods, & Snacks.)	\$1.17 \134,677 (Mar. 2004)	Retail HRI	Japans Thailand (1) China (2)	Importers Direct	4-6-5, Utajima, Nishiyodogawa-ku, Osaka City 555-8502	Tel: 06-6477-8367 Fax: 06-6477-6604 Overseas Dept.
47.	Kagome Co., Ltd. (Fruits & Vegetables Beverages, Seasonings, Frozen Foods, Retort Foods, Frozen Foods, Sauces, & Soups.)	\$1.17 \134,195 (Mar. 2004)	Retail HRI	Japan (6) U.S.A. (1) Taiwan (1)	Importers, Direct	3-14-15, Nishiki, Naka-ku, Nagoya City, Aichi 460-0003	Tel: 03-5623-8511 Fax: 03-5623-2338 Procurement Dept. (Tokyo)
48.	Kikkoman Corporation (Soy Sauces, Seasonings for Rice Dish, & Seasoning Sauces.)	\$1.10 \126,967 (Mar. 2004)	Retail HRI	Japan (5) U.S.A. (1) Singapore (1) China (1) Taiwan (1) Netherlands (1)	Importers Direct	250, Noda, Noda City, Chiba 278-8601	Tel: 04-7123-5170 Fax: 04-7123-5150 Purchasing Dept.
49.	Air Water Inc. (Ham & Sausages, and Frozen Seafood & Vegetables.)	\$1.10 \126,081 (Mar. 2004)	Retail HRI	Japan Overseas (9)	Importer Direct	1-20-16, Higashi-shinsaibashi, Chuo-ku, Osaka City 542-0083	Tel: 011-811-1621 Fax: 011-811-0911 info-shuusetsu-h@awi.co.jp Shunsetsu Saveur Co., Ltd.
50.	Nisshin Foods Co., Ltd. (Frozen Pasta, Frozen Pasta Sauces, & Frozen Foods.)	\$1.08 \124,693 (Mar. 2003)	Retail HRI	Japan (2)	Importers	1-25, Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-8441	Tel: 03-5282-6200 Headquarters
51.	Showa Sangyo Co., Ltd. (Flour, Cooking Oil, Pasta, Pasta Sauces, Frozen Foods, & Frozen Bread Dough.)	\$1.08 \124,637 (Mar. 2004)	Retail HRI	Japan (3)	Importers Direct	Kamakurakashi Bldg. 2-2-1, Uchikanda, Chiyoda-ku, Tokyo 101-8521	Tel: 03-3257-2973 Fax: 03-3257-2948 Raw Materials Dept.
52.	UCC Ueshima Coffee Co., Ltd. (Coffee, & Coffee Drinks.)	\$1.07 \123,578 (Mar. 2004)	Retail HRI	Japan (7) U.S.A. (1) Taiwan (1)	Importers Direct	7-7-7, Minatojima-nakamachi, Chuo-ku, Kobe City 650-0046	Tel: 078-304-8887 Fax: 078-304-8865 Raw Materials Import Dept.
53.	Calpis Co., Ltd. (Concentrate Beverages, Functional	\$0.96 \110,964 (Dec. 2003)	Retail HRI	Japan (3)	Importers Direct	2-20-3, Ebisunishi, Shibuya-ku, Tokyo 150-0021	Tel: 03-6412-3330 Fax: 03-5721-4031 Raw Materials Dept.

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
	Foods & Drinks, Alcoholic Beverages, & Chilled & Dairy Products.)						
54.	Nagoya Seiraku Co. (Cream, Ice Cream, Fruit Beverages, Frozen Dessert, & Frozen Vegetables.)	\$0.96 \110,027 (Mar. 2003) Consolidated	Retail HRI	Japan (3)	Importers Direct	310, Nakasunacho, Tenpaku-ku, Nagoya City 468- 8588	Tel: 03-3946-8583 Fax: 03-3946-4405 Overseas Business Dept. (Tokyo)
55.	Nippon Lever, K.K. (Tea, & Margarine.)	\$0.96 (Dec. 2002)	Retail HRI	Japan (1)	Importers, Direct	Nakameguro GT Tower, 2-1-1, Kamimerugo, Meguro-ku, Tokyo 153-8578	Tel: 03-5723-2211 Headquarters
56.	Yuasa Funashoku Co., Ltd. (Processed Foods, Western & Japanese Confectioneries, Chilled & Frozen Foods, & Breads.)	\$0.94 \108,366 (Mar. 2004)	Retail	Japan (2)	Importers, Direct	3-10-3, Miyamoto, Funabashi City, Chiba 273-8551	Tel: 047-433-1211 Headquarters
57.	Asahi Denka Co., Ltd. (Cooking Oil Products, Mayonnaise & Dressings, Creams, & Frozen Cakes.)	\$0.93 \107,478 (Mar. 2004)	HRI	Japan (3) Singapore (1) China (1)	Importers	Furukawa Bldg., Nihombashi- muromachi, Chuo- ku, Tokyo 103-0022	Tel: 03-5255-9081 Fax: 03-3241-5351 Foods G, Purchasing & Distribution Dept.
58.	Ajinomoto Frozen Foods Co., Inc. (Frozen Processed Foods)	\$0.91 \105,000 (Mar. 2004)	Retail HRI	Japan (4) U.S.A. (1) Thailand (2) China (3)	Importers, Direct	1-16-7, Kyobashi, Chuo-ku, Tokyo 104-8315	Tel: 03-5250-1150 Fax: 03-5159-0582 Tadanoh @ffa.ajinomoto. com FFA International Co., Ltd. Strategic Materials Dept.
59.	S&B Foods, Inc. (Retort Roux, Seasoning Spices, Instant Foods, Retort Foods, & Retort Rice Products.)	\$0.87 \99,878 (Mar. 2004)	Retail HRI	Japan (3)	Importers, Direct	18-6, Nihombashi- kabutocho, Chuo- ku, Tokyo 103-0026	Tel: 03-3558-5531 Fax: 03-3558-8981 Procurement Dept., Supply Div.
60.	Yonekyu Co. Ltd. (Ham, Sausages, & Chilled & Frozen Deli.)	\$0.86 \99,270 (Feb. 2004)	Retail HRI	Japan (11) U.S.A. (1) China (2)	Importers, Direct	1259, Okanomiya Terabayashi, Numazu City, Shizuoka 410-8530	Tel: 055-922-5321 Fax: 055-922-5345 Headquarters
61.	Mercian Corporation (Wine & Liqueur.)	\$0.84 \97,065 (Mar. 2003)	Retail HRI	Japan (9)	Importers, Direct	1-5-8, Kyobashi, Chuo-ku, Tokyo 104-0031	Tel: 03-3231-3922 Headquarters

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
62.	Ajinomoto General Foods Inc. (Instant Coffee, Coffee, & Powder Milk.)	\$0.84 \96,400 (Mar. 2003)	Retail HRI	Japan (2)	Importers, Direct	Sphere Tower Tennozu Bldg., 2-2- 8, Higashi- Shinagawa, Shinagawa-ku, Tokyo 140-8651	Tel: 03-5302-7745 Fax: 03-5302-7623 Raw Material G, Production Management Dept.
63.	Food Supply Jusco Ltd. (Deli & Sandwiches.)	\$0.83 \949,15 (Feb. 2003)	Retail	Japan	Importers, Direct	24-12, Takasecho, Funabashi City, Chiba 273-0014	Tel: 047-431-8396 Fax: 047-432-3748 Headquarters
64.	Nosan Corporation (Soup, Mayonnaise, Processed Foods, & Confectioneries.)	\$0.82 \94,019 (Mar. 2004)	Retail	Japan (5)	Importers, Direct	Landmark Tower 46F, 2-2-1, Minatomirai, Nishi- ku, Yokohama City 220-8146	Tel: 045-224-3707 Fax: 045-224-3724 y_sioi@nosan.co.jp Materials Dept.
65.	Calbee Foods Co., Ltd. (Fried Snacks & Cereals.)	\$0.82 \93,940 (Mar. 2004)	Retail	Japan (10) U.S.A. Thailand China	Importers, Direct	1-20-1, Akabane- minami, Kita-ku, Tokyo 115-0044	Tel: 03-3902-3323 Fax: 03-3902-7168 Raw Materials Procurement Team, Purchasing Dept.
66.	DAIEI TAIGEN CO., LTD. (Seafood, & Frozen Fish.)	\$0.77 \89,087 (Mar. 2004)	Retail HRI	Japan (3)	Importers, Direct	Sakaisuji Homomachi Center Bldg., 2-1-6, Homomachi, Chuo- ku, Osaka City 541- 0053	Tel: 06-6271-9551 Fax: 06-6271-9554 t.kamohara@daieit aigen.co.jp Overseas Business Dept.
67.	NOF Corporation (Shortening, Margarine, Cream, & Fillings.)	\$0.77 \88,849 (Mar. 2004)	Retail HRI	Japan (3) Indonesia (1) Taiwan (1)	Importers	4-20-3, Ebisu, Chibuya-ku, Tokyo 150-6019	Tel: 03-5424-6660 Material Dept.
68.	Warabeya- Nichiyo Co., Ltd. (Deli, Sandwiches, & Rice Ball for CVS)	\$0.77 \88,761 (Feb. 2004)	Retail HRI	Japan (16) U.S.A. (1)	Importers	5-7-10, Ogawahigashicho, Kodaira City, Tokyo 187-0032	Tel: 042-345-3134 Purchasing Dept.
69.	Sanyo Foods Co., Ltd. (Instant/Chilled/F rozen Noodles.)	\$0.76 \87,368 (Mar. 2004)	Retail	Japan (6) U.S.A. (1) China (1)	Importers, Direct	555-4, Asakuramachi, Maebashi City, Gunma 371-0811	Tel: 027-220-3421 Fax: 027-220-3426 Headquarters
70.	Glico Dairy Products Co., Ltd. (Milk, Yogurt, Fruits Beverages, & Puddings.)	\$0.75 \86,100 (Mar. 2004)	Retail	Japan (5)	Importers	2-14-1, Musashino, Akishima City, Tokyo 196-0021	Tel: 042-544-2222 Headquarters
71.	Fuji Baking Co., Ltd. (Breads)	<i>Unconsolidated</i> \$0.74 \85,610 (June 2004) <i>Consolidated:</i> \$2. 72 \312,357	Retail HRI	Japan (13)	Importers Direct	1-50, Matsusono- cho, Mizuho-ku, Nagoya City 467- 8651	Tel: 052-831-5154 Fax: 052-837-3844 Headquarters

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
72.	Bourbon Corporation (Cookies, Rice Confectioneries, Beverages, Gum, Candies, & Snacks.)	\$0.73 \84,152 (Mar. 2004)	Retail	Japan (9)	Importers, Direct	4-2-14, Matsunami, Kashiwazaki City, Niigata 945-8611	Tel: 0257-24-1222 Fax: 0257-23-4049 sizai1@bourbon.co.jp Materials Management Dept. 1, Production Management Div.
73.	Takanashi Milk Products Co. Ltd. (Milk, Yogurt, Cream, Fruits & Vegetables Beverages, Coffee, Chilled Dessert, & Ice Cream.)	\$0.67 \77,090 (Sept. 2004)	Retail HRI	Japan (7)	Importers, Direct	5, Honjukucho, Asahi-ku, Yokohama City 241-0023	Tel: 045-680-2924 Fax: 045-680-2929 h-nakahara@takanashi-milk.co.jp Overseas Business Dept.
74.	Hagoromo Foods Corporation (Canned Seafood, Canned Fruits, Pasta, & Canned Foods.)	\$0.66 \75,934 (Mar. 2003)	Retail HRI	Japan (4) Indonesia (1)	Importers, Direct	151, Shimizu-shimazakicho, Shizuoka City, 424-8750	Tel: 0543-54-5010 Fax: 0543-54-5074 Raw Materials & Raw Fish G, Production Dept. 2
75.	Kanemi Foods Co., Ltd. (Sushi, Lunch Box, Rice Ball, & Deli.)	\$0.63 \71,899 (Mar. 2003)	Retail HRI	Japan (11)	Importers	90, Nakatsubochi, Tenpaku-ku, Nagoya City 468-0048	Tel: 052-895-2141 Headquarters
76.	Nippon Ham Foods Co., Ltd. (Processed Foods, & Cooked Foods.)	\$0.58 \66,167 (Mar. 2002)	Retail	Japan	Importers	601-1, Misaki, Kisosaki-cho, Kuwana-gun, Mie 498-0814	Tel: 0567-68-3171 Headquarters
77.	Kibun Foods, Inc. (Processed Fish Foods, Processed Chicken Foods, & Dessert.)	\$0.57 \65,700 (Mar. 2004)	Retail HRI	Japan (7) Thailand (1)	Importers, Direct	7-14-13, Ginza, Chuo-ku, Tokyo 104-8101	Tel: 03-3544-2663 Fax: 03-3544-2680 Merchandising Dept., Supply Div.
78.	Sapporo Beverage Co., Ltd. (Tea, Mineral Water, Coffee, Coffee Beverages, & Functional Beverages.)	\$0.57 \65,600 (Dec. 2003)	Retail	Japan	Importers, Direct	5F., Ebisu Garden Place Tower, 4-20-3, Ebisu Shibuya-ku, Tokyo 150-0013	Tel: 03-5795-1193 Fax: 03-3795-1182 Purchasing Dept.
79.	Musashino Corporation (Deli & Noodles.)	\$0.57 \65,500 (Mar. 2003)	Retail	Japan (15) Taiwan (2)	Importers	1-1-1, Nishihara, Asaka City, 351-0034	Tel: 048-487-6004 Fax: 048-487-6083 Headquarters
80.	Kobeya Baking Co., Ltd. (Loaf Breads, Sweet Breads, Cooked Breads, Western Confectionery, & Frozen Dough.)	\$0.57 \65,260 (Dec. 2003)	Retail HRI	Japan (8)	Importers, Direct	2-16-14, Hoshin, Higashiyodogawa-ku, Osaka City 533-0014	Tel: 06-6321-7209 Fax: 06-6329-1251 Purchasing Dept.

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
81.	Pokka Corporation (Coffee, Lemon Beverages, Tea, Soups, & Functional Beverages.)	\$0.56 \64,847 (Mar. 2004)	Retail HRI	Japan (3) China (1) Malaysia (1) Singapore (1)	Importers, Direct	35-16, Daikancho, Higashi-ku, Nagoya City 461-8648	Tel: 0568-21-1511 Fax: 0568-21-1184 Kanefumi_yamamoto@pk.pokka.co.jp Procurement Group
82.	Riken Vitamin Co., Ltd. (Soup, Seasonings, & Dressings.)	\$0.56 \64,384 (Mar. 2004)	Retail HRI	Japan (5) China (2)	Importers, Direct	2-9-18, Misakicho, Chiyoda-ku, Tokyo 101-8370	Tel: 03-5275-5131 Fax: 03-3261-2628 fum_mitani@rike-vita.co.jp Material Dept.
83.	Kameda Seika Co., Ltd. (Rice Confectionery, & Functional Foods.)	\$0.55 \62,976 (Mar. 2004)	Retail	Japan (3) U.S.A. (1) China (1)	Importers, Direct	3-1-1, Kameda Kogyo Danchi, Kameda-machi, Nakakanbara-gun, Niigata	Tel: 025-382-8812 Fax: 025-381-1365 Overseas Business Dept.
84.	Kyodo Milk Industry Co., Ltd. (Milk, Soy Milk, Cheese, Cream, Yogurt, Ice Cream, & Frozen Cakes.)	\$0.54 \61,883 (Mar. 2004)	Retail HRI	Japan (5)	Importers, Direct	2-4, Saiwaicho, Itabashi-ku, Tokyo 173-0034	Tel: 03-5966-2203 Fax: 03-5966-3020 Material Dept.
85.	Ikedatohka Industries Co., Ltd. (Dried Vegetables & Fruits, Seasonings, Dessert Sauces, & Functional Foods.)	\$0.54 \61,800 (Mar. 2003)	HRI	Japan (8) Overseas (2)	Importers, Direct	2-28, Sakurababacho, Fukuyama City, Hiroshima 720-8638	Tel: 03-3320-8186 Fax: 03-5351-7832 Ikeda International Co., Ltd. (Tokyo)
86.	Sun Delica Co., Ltd. (Sandwiches & Delis.)	\$0.53 \61,400 (Dec. 2003)	Retail	Japan (23)	Importers	Yamazaki Iwamotocho Bldg., 6F., 3-10-1, Iwamoto-cho, Chiyoda-ku, Tokyo 101-0032	Tel: 03-3864-3240 Fax: 03-3864-8685 Purchasing Div.
87.	Nissei Co., Ltd. (Beverages)	\$0.53 \60,412 (Mar. 2002)	Retail	Japan (7)	Importers	896-2, Shimoedome, Oigawa-cho, Shida-gun, Shizuoka 421-0298	Tel: 054-622-1212 Fax: 054-622-5618 Headquarters
88.	Doutor Coffee Co., Ltd. (Coffee)	\$0.51 \59,047 (Mar. 2004)	Retail HRI	Japan (2)	Direct	1-10-1, Jinnan, Shibuya-ku, Tokyo 150-0041	Tel: 03-5459-9056 Fax: 03-5459-9057 Merchandising Dept.
89.	The Marine Foods Corporation (Seafood & Processed Seafood.)	\$0.51 \58,287 (Mar. 2002)	Retail HRI	Japan (1)	Importers, Direct	5-33-7, Shiba, Minato-ku, Tokyo 108-0014	Tel: 03-3452-8111 Fax: 03-3452-8589 Headquarters
90.	Myojo Foods, Co., Ltd. (Noodles, Pasta, Frozen Noodles, & Processed Foods.)	\$0.50 \57,771 (Sept. 2003)	Retail HRI	Japan (1) U.S.A. (1) Singapore (1)	Importers	3-50-1, Sengdagaya, Shibuya-ku, Tokyo 151-0051	Tel: 03-3470-1691 Fax: 03-3470-6793 Headquarters

	Company (Main Product Types)	Net Sales (\$ bill. at 1\$=115 yen) (\ = mill.)	End-User Channels	Production Location	Procurement Channels	Address	Phone #/Fax #/ E-mail Address
91.	Nihon Shokken Co., Ltd. (Seasonings, Seasoning Sauces, Dressings, Premix, Ham & Sausages, & Processed Foods.)	\$0.50 \57,159 (Sept. 2003)	Retail HRI	Japan (4)	Importers, Direct	1-3, Tomita Shinko, Imabari City, Ehime Pref. 799-1582	Tel: 0898-24-1171 Fax: 0898-22-2093 Trade Dept.
92.	San-Ei Gen F.F.I Inc. (Food, Food Additives, & Food Ingredients.)	\$0.49 \56,556 (Mar. 2003)	HRI	Japan (4)	Importers, Direct	1-4-9, Hiranomachi, Chuo-ku, Osaka City 540-8688	Tel: 06-6333-0525 Fax: 06-6333-2793 Raw Materials Dept., International Business Company
93.	Sanwa Shurui Co., Ltd. (Liquor, White Liquor, & Wine.)	\$0.48 \55,351 (July 2003)	Retail HRI	Japan (2)		2231-1, Yamamoto, Usa City, Oita Pref. 879-0467	Tel: 0978-32-1431 Fax: 0978-33-3030
94.	Takasago International Corp. (Fragrance & Flavor.)	\$0.48 \54,994 (Mar. 2003)	HRI	Japan (3) Overseas (23 countries)	Importers, Direct	Nissei Aroma Square 17F., 5-37-1, Kamata, Ota-ku, Tokyo 144-8721	Tel: 03-5744-0565 Fax: 03-5744-0663 Flavor Planning Dept.
95.	Oriental Kobo Kogyo Co. (Yeast, Flour Paste, Mayonnaise, & Fillings.)	\$0.47 \53,918 (Mar. 2004)	HRI	Japan (6)	Importers	3-6-10, Azusawa, Itabashi-ku, Tokyo 174-8505	Tel: 03-3968-8319 Fax: 03-3968-8929 Merchandise Dept., Food Business Div.
96.	Chubu Suisan Co., Ltd. (Processed Seafood)	\$0.47 \53,494 (Mar. 2004)	Retail HRI	Japan (1)	Direct	2-22, Kawanamicho, Atsuta-ku, Nagoya City 456-0072	Tel: 052-683-3065 Fax: 052-683-3059
97.	Nagatanien Co., Ltd. (Flakes for rice, Cooked Foods, & Soups.)	\$0.45 \52,167 (Mar. 2004)	Retail	Japan (2)	Importers	2-36-1 Nishi-shimbashi, Minato-ku, Tokyo 105-8448	Tel: 03-3432-3270 Fax: 03-3432-3271 Purchasing G., Production Management Business Dept.
98.	Fuji Foods, Inc. (Deli, Rice Ball, Breads, & Deli for CVS.)	\$0.44 \50,791 (Mar. 2004)	Retail HRI	Japan (10) U.S.A. (1) Taiwan (1)	Importers	24-3, Takasecho, Funabashi City, Chiba 273-0014	Tel: 047-434-5085 Headquarters
99.	Kanebo Foods, Ltd. (Confectioneries, Cup Noodle, Ice Cream, & Drinks.)	\$0.40 \46,500 (Mar. 2003)	Retail	Japan (3)	Importers	3-20-20, Kaigan, Minato-ku, Tokyo 108-0022	Tel: 03-5446-3671 Fax: 03-5446-3684 Overseas Products Dept.
100.	Mitsui Norin Co., Ltd. (Tea.)	\$0.29 \33,224 (Mar. 2004)	Retail HRI	Japan	Importers	Shinjuku Mitsui Bldg. 2, 3-2-11, Nishi-shinjuku, Shinjuku-ku, Tokyo 160-8381	Tel: 03-5325-2877 Fax: 03-5326-7520 stanaka@mnk.co.jp Purchasing Dept., Production Management Div. mshimizu@mnk.co.jp Products Planning Dept.

Source: Market Makers Inc.

D. SECTOR TRENDS

It is estimated by the Japanese Ministry of Agriculture, Forestry, and Fisheries that 60% of Japanese food consumption on a calorie basis was supplied by imported foods in 2003. Relying on low cost imported food inputs, food processors have developed a multitude of items that are further processed in Japan for the general population.

Recently, however, in an effort to reduce costs, an increasing number of Japanese food processors have been going off-shore to source processed food items they have traditionally produced domestically. Ajinomoto, the second largest frozen food company, has manufacturing plants in 22 countries. Nippon Ham, the largest meat processor in Japan, has joint ventures in Thailand, Australia, Mexico and the U.S. that export processed meat and related products to Japan. Many Japanese companies invest in China to produce products specifically for the Japanese market including frozen vegetable and other processed frozen food products.

In general, foreign direct investment in the Japanese food processing market is minimal. Most U.S. brands that are produced in Japan are licensed or co-packed.

At the consumer level, the following trends are driving the ways food processors are marketing their products.

1. Food Safety

Japanese consumers have been sensitized to safety issues by series of food scandals and health scares during the past decade, including deaths related to E.coli O-157/H7, mass sickness from tainted dairy products, BSE found in Japanese cows, mis-labeling of meat and marine products and most recently avian influenza. Consumer concerns on biotechnology drives retailers to have kept products containing biotechnology ingredients from taking root in Japan. In order to mention “non-biotech” for the ingredient(s) in food labeling, IP handling and its certificate are required by law for the ingredients of certain processed foods such as soy-base tofu and natto and corn-base snack foods.

Numerous food recalls have taken place for even small incidents of foreign materials in products. As a result, Japanese food processors demand that suppliers follow strict quality assurance procedures, including HACCP systems and traceability to the point of origin of the ingredients. The importance of food safety procedures will likely continue to grow in the future. This means an increased amount of work for suppliers but also presents opportunities for those who can guarantee the required quality.

2. Diversification of the Diet

The trend toward diversification of the Japanese diet continues to grow. Every year new “hit” food items based on foreign products make their mark on the diet in Japan. Examples over the past half-decade include pasta, pizza, olive oil, Tiramisu, Nata de Coco, cinnamon buns, Belgian waffles, and scones. More importantly, the trend toward internationalization of the diet is clearly reflected in the growing presence of restaurants in Japan featuring ethnic food. From the U.S., names such as McDonald’s and KFC have long been prominent. The most recent example of a major success of U.S. food concept is the coffee shop chains such

as Starbucks and Tully's. They have introduced new products such as flavored coffees and wrap sandwiches. The "internationalization" of the Japanese diet offers U.S. exporters an opportunity to supply ingredients to meet this increasing demand.

3. Growth of Convenience Foods

The increasingly hectic pace of Japanese lifestyle has led to the growth of processed foods as a replacement for meals made from scratch at the home. The best example of this is the rapid expansion of convenience store chains over the past decade, which specialize in a large variety of pre-prepared meals, including not only traditional bento lunch boxes and onigiri (rice ball), but pasta dishes, sandwiches, salads, baked goods, and desserts as well. There are now over 50,000 convenience stores in Japan. More recently, retail and foodservice chains specializing in ready-to-eat prepared take-out items such as delicatessen, curry, and dim-sum have been expanding rapidly. Some of these allow consumers to create their own bento-lunch box to go from among a buffet style offering.

4. Value Pricing

The deflationary environment of the past decade has caused consumers to be more cost conscious in their food budget. Companies such as McDonald's have promoted low-priced value sets, which has led to intense competition among foodservice and retail operators. This in turn is causing food suppliers to seek out lower cost inputs in order to provide more competitive prices to their customers.

5. Health

Functional foods designed to treat or help specific bodily functions are becoming increasingly popular. Examples include yogurt with lactic bacteria to help digestion and breads with added wheat germ. Blueberries have become popular as ingredients after being touted as an aid to eyesight, and have appeared in numerous new products such as gum, yogurt, bagels and cookies. Most recently, collagen is featured as an ingredient in yogurt promoting skin health.

Soy milk products have been expanding at a rapid rate in Japan due to perceived health benefits.

Diet conscious consumers have been switching from sugar, soft drinks, cakes and ice creams to low calorie teas, mineral water, and lower calorie-containing items.

The official definition of functional foods and drinks in Japan is "foods which are expected to have a specified effect on health due to the relevant constituents or foods from which allergens have been removed." In practice the products which are considered to be functional foods are products containing functional ingredients such as dietary fiber, oligosaccharides, non-cariogenic sweeteners, calcium, iron, mineral absorption promoters, beta-carotene, PUFA (DHA and EPA), chitosan, specified soy protein, collagen, polyphenols, lactic acid bacteria cultures, soy iso-flavones and germinated brown rice (GABA).

Organic foods and those marketed as all natural are also gaining popularity. This includes processed items as well as fresh vegetables. However this is still a niche market.

III. COMPETITION

The U.S. is the largest supplier of agricultural products to Japan, with a market share of 30% in 2004. Total U.S. agriculture exports to Japan in 2004 were worth approximately \$12.7 billion.

Other major suppliers of agricultural products to Japan are China (12%), Australia (10%), Canada (7%) and Thailand (5%).

A brief review by major product category follows. The market shares stated in this section are based on CY 2004 imports into Japan as reported by the Customs and Tariff Bureau of the Japan Ministry of Finance and do not reflect Japanese domestic production.

1. Red Meats

The U.S. is the second largest supplier of red meats to Japan with imports from the United States totaling \$1.5 billion in 2004 that were “primarily of pork” with a market share of 20%, a huge decline from the previous year with imports of \$2.7 billion and a market share of 41%, due to the import ban on U.S. beef caused by the discovery of a BSE case in December, 2003. Australia is the largest supplier of red meats (primarily beef) to Japan with 2004 imports of \$2 billion with a market share of 28% catering to retail, food service and hamburger paddies for fast foods and restaurants. Denmark is the third largest supplier of red meats (primarily frozen pork to be used for ham and bacon manufacturing) to Japan with imports of \$1.4 billion representing a market share of 20%.

2. Fish and Seafood Products

The U.S. is the second largest supplier of edible fish and seafood products behind China. The Japan’s imports of edible seafood products from the U.S. accounted \$1.4 billion in 2004, composed mainly of roe and urchin egg (\$489 million), surimi (\$239 million), salmon (\$138 million), and crab (\$74 million). Japan’s imports from China in 2004 for such products totaled \$2.8 billion with a 20% share, followed by the United States (10%), and Russia (8%).

3. Soybeans

The U.S. is the largest supplier of soybeans to Japan with 2004 imports of \$1.2 billion representing 70% of market share followed by Brazil (\$293 million and 17% share) and Canada (\$123 million and 7%). Japanese food processors request non-biotech soybeans for products that need to be mentioned in label.

4. Processed Fruits & Vegetables

The U.S. is the second largest supplier of processed fruits and vegetables to Japan with imports from the United States totaling \$571 million in 2004 representing 19% of total imports. Import from China in 2004 was \$1.3 billion with 45% share. Major frozen fruits and vegetables from the U.S. include potatoes, corns, peas, mix vegetables, strawberries and blueberries.

5. Fresh Fruit

The U.S. is the second largest supplier of fresh fruits to Japan with 2004 imports of \$525 million representing a share of 31%. Philippine is the largest supplier to Japan with imports of \$600 million with a market share of 36 percent.

6. Fruit & Vegetable Juice

The U.S. is the leading supplier of fruit & vegetable juice to Japan with 2004 imports of \$201 million representing a 35% market share followed by Brazil (20%) and China (9%).

7. Fresh Vegetables

The U.S. is the second largest supplier of fresh vegetables to Japan behind China. Japan's imports of fresh vegetables from the United States totaled \$150 million in 2004, with a market share of 16%. Japan's imports from China totaled \$426 million with a share of 45%.

8. Tree Nuts

The U.S. is the largest supplier of tree nuts to Japan with 2004 imports of \$185 million representing a share of 40 percent, followed by China with imports of \$157 million representing 34 % share. Major items from the United States are almond and walnut.

9. Poultry

The U.S. is the fourth largest supplier of poultry to Japan with imports from the United States totaling \$70 million in 2004 with 4% share of total imports, declined from the 2003 level with imports of \$111 million and 7% share. Brazil is the largest supplier of poultry to Japan with imports of \$605 million with 37% share in 2004. Japan's imports from Brazil are primarily broiler meat (mostly boneless cuts) to be used in HRI and food processing sectors for further processing. Since Japan could not import broiler/other poultry meat from China and Thailand due to bird flue related import ban in 2004, imports from Brazil resulted in almost 2.3 times of the level in 2003. China and Thailand, therefore, are left mainly to supply value added cooked products such as yakitori and karaage (heat treated) produced in eligible processing plants approved by MAFF in 2004. Japan has sizeable investments in making such products in Thailand and China. China was the second largest supplier to Japan in 2004 (\$499 million with 30% share) followed by Thailand (\$360 million with a share of 22%). Japan's imports from the U.S. are mainly broiler bone-in leg meat, which makes U.S. less competitive compared to Brazil.

10. Dairy Products

The U.S. is the third largest supplier of dairy products to Japan with 2004 imports of \$127 million representing 9% share behind Australia (\$357 million with 26% share) and New Zealand (\$245 million with 18% share). The U.S. has been competitive in cream cheese and pizza cheese.

11. Wine and Beer

The U.S. is the third largest supplier of wine and beer to Japan with 2004 imports of \$67 million representing 6% share, behind France (59% share) and Italy (11% share). Wine is imported primarily in bottled form but also as bulk for blending with Japanese wines.

12. Bakery and Confectionary Products

The U.S. is the leading exporter of bread, pastry, cakes, biscuits and other bakers' wares to Japan with 2004 imports of \$68 million representing 26% market share. Among that category, Japan's imports of cookie and biscuit from the United States totaled \$10 million representing a share of 15 percent. The U.S. is also the leading exporter of mixes and dough for the preparation of bakery products with imports from the United States totaling \$17 million in 2004 with a 24% share, followed by China with a 13% share.

For chocolate confections, the U.S. is the fourth largest supplier to Japan with 2004 imports of \$5.5 million representing a share of 11 percent behind France (30%), Belgium (20%), and Switzerland (14%).

13. Food Supplements

The U.S. is the dominant supplier of food supplements with a vitamin base to Japan. Japan's imports of food supplements from the United States were \$67 million with a 98% market share in 2004.

14. Dry Goods and Condiments

The U.S. is the second largest supplier of sauces, condiments and seasonings to Japan with 2004 imports of \$30 million representing 16% share, behind New Zealand (\$32 million with a share of 17%) and followed by Thailand with 15%. Among the category, The U.S. is the dominant supplier of tomato ketchup and other tomato sauce with 2004 imports of \$4.5 million with 72 % share.

The U.S. is the largest supplier of soups and broths to Japan with 2004 imports of \$18 million representing a market share of 41 percent.

15. Protein concentrates and textured protein

The U.S. is the leading supplier to Japan of protein concentrates and textured protein substances used as binders and extenders in frozen foods, bread, meat products and seafood products such as Kamaboko. Japan's imports from the United States for such products were \$12 million in 2004 with a share of 72%.

A summary of the competitive structure for key food categories appears below.

Product Category	Major Supply Source	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Fish & Seafood Net Imports: \$13 Billion	1. China - 20% 2. U.S. - 10% 3. Russia - 8%	China is the leading low cost supplier of seafood. Russia is the major source for crab. The U.S. is the major supplier of surimi, roe and urchin to Japan.	Japanese companies fish worldwide for marine resources.
Red Meat (fresh/chilled/frozen) Net Imports: \$7.1Billion	1. Australia - 28% 2. U.S.- 20% 3. Denmark -20%	The US has been a cost efficient supplier of both beef and pork but had no beef export to Japan in 2004 due to the import ban of US beef to Japan due to the discovery of BSE case. Australia is a cost efficient beef producer. Denmark is a major supplier of quality, low cost pork.	The high cost of feed and raising cattle and swine makes local production very expensive. Local production has the advantage of freshness.
Processed Fruit & Vegetables Net Imports: \$3 Billion	1. China - 45% 2. U.S. - 19% 3. Thailand - 6%	China is a low cost supplier of many vegetables popular in Japan. The U.S. is a major supplier of frozen potatoes, corn, peas, and mixed vegetables	High costs make local production less competitive for further processing.
Soybeans Net Imports: \$1.8 Billion	1. U.S. – 70% 2. Brazil – 17% 3. Canada – 7%	The U.S. is a major supplier of soybeans to be processed for soy source, Tofu, Natto, soymilk, vegetable oil, etc.	GMO issue is a key concern among Japanese food processors.
Fresh Fruit Net Imports: \$1.7 Billion	1. Philippines – 36% 2. U.S. – 31%	The U.S. is the leading supplier of quality, price competitive grapefruits and oranges.	The consumer desire for freshness benefits Japanese production of mikan, strawberries,

Product Category	Major Supply Source	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
		The Philippines is a major supplier of bananas, mangos and pineapples.	peaches, grapes, and apples. Customers rely on imports in off-season periods.
Poultry Net Imports: \$1.6 Billion	1. Brazil - 37% 2. China - 30% 3. Thailand - 22%	Brazil is the low cost source for raw commodity chicken. Thailand and China both are low cost producers of processed chicken.	The high cost of local poultry production makes it less attractive to food service operators. Most domestic production goes to the retail market where freshness is valued.
Wine and Beer Net Imports: \$1.2 Billion	1. France – 59% 2. Italy 11% 3. U.S. – 6%	France is the leading exporter of wines to Japan, followed by Italy.	Wine consumptions in Japan have been steadily increasing.
Fresh Vegetables Net Imports: \$958 Million	1. China – 45% 2. U.S. – 16%	China is the leading supplier of fresh vegetables to Japan due to both competitive price and proximity.	Though Japanese domestic vegetables are expensive, consumers perceive them as both safer and fresher, and are willing to pay a premium for them. Pesticide residue is strong concern among Japanese consumers. Japanese Quarantine regulations often make it difficult for fresh vegetable to be imported to Japan.
Snack Foods (excluding nuts) Net Imports: \$668 Million	1. China – 16% 2. U.S. – 16% 3. Australia – 9%	The U.S. is the leading supplier of Western-style snack foods (cookies, candies, pretzels, chips). China provides some Japanese-style snack items at a competitive price.	Japanese food processors have the advantage of freshness, familiarity with Japanese regulations in use of additives and food labeling law, and knowledge of Japanese preference in taste and

Product Category	Major Supply Source	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
			packaging.
Fruit & Vegetable Juice Net Imports: \$575 Million	1. U.S. – 35% 2. Brazil – 20%	The U.S. is the leading supplier of price competitive, high quality apple, grapefruit, tomato & orange juice. Brazil is the low cost supplier of orange juice.	Japanese processors imports juice concentrates and package in Japan. Retailers and food service operators in Japan prefer tetra pack for their use.

Source: ATO – JBICO reports based on Japan Government Import Statistics

IV. Best Products Prospective

A. PRODUCTS PRESENT IN THE MARKET WHICH HAVE GOOD SALES POTENTIAL

1. Red Meats

Pork: Alternative demand for pork due to the ban on U.S. beef is mostly generated from HRI and retail sector in 2004. Dishes like pork bowl and pork barbecue are examples. Imported frozen pork cuts from Denmark, Canada, U.S. and EU are mainly used as raw materials for ham, bacon and sausage products, with some of which catering to prepared and ready to eat foods (lunch boxes and etc.) [Denish frozen belly cut is a main stay for bacon. U.S. frozen picnic cut is preferably used to make sausage.] While the import demand for frozen pork cuts for ham, bacon and sausage products have remained relatively stable in recent years, the growth prospect for Japan' prepared and ready to eat sector is still good.

Beef: Once Japan's beef market reopens, strong demand will be generated particularly for U.S. cuts such as short plate and short lib mainly to be used for beef bowl and barbecue.

2. Surimi, Roe, and Urchin:

Japan is a major market for U.S. surimi, roe and urchin and should continue to be so in the future. Major roes include salmon roe, cod roe, and herring.

3. Processed Fruits & Vegetables:

Although the imports of frozen vegetables from China have been increasing due to the lower costs, the U.S. has competitive advantages in higher value added products such as fruits & vegetable purees and paste as well as a variety of mixed vegetable assortment. The U.S. also has competitive advantages in potatoes, corn, peas, carrots, and various berries.

4. Soybean:

The U.S. is a dominant supplier of soybean to Japan for uses of traditional food items such as soy sauce, Tofu, Miso (soybean paste) and Natto (fermented soybeans). Soymilk products have been expanding at a rapid rate in Japan due to perceived health benefits.

5. Fresh Fruit:

The U.S. is a leading supplier of quality and price competitive citrus fruits such as grapefruits and oranges. Strawberries are imported for use of cakes during the off-season in Japan. American cherries are popular for the retail market. Blueberries are also becoming popular resulted from the health taste among consumers.

6. Tree Nuts:

The U.S. is a major supplier of almond and walnuts to Japan and thus the U.S. exports ncrease as the overall market for those products grow. With the recent health trend in the market, the demand for those products has been growing.

7. Health and Functional Foods

The market for health related and functional foods is expected to continue to expand in the future. Ingredients which should benefit include dietary fiber, oligosaccharides, non-

cariogenic sweeteners, calcium, iron, mineral absorption promoters, beta-carotene, PUFA (DHA and EPA), chitosan, specified soy protein, collagen, polyphenols, lactic acid bacteria cultures, and soy iso-flavones. The Japan Health Food and Nutrition Food Association released figures for sales of FOSHU (Foods For Specified Health Use) items that showed the market for the finished products grew to ¥568 billion (\$4.9 billion) in 2003 from ¥227 billion (\$1.9 billion) in 1999, as follows:

Sales of FOSHU Items (2003)		
Type	\ Billion	\$ Million
Lactic Acid Bacteria	342.1	2,956.7
Dental Caries Related	80.4	694.9
Blood Sugar Related	27.7	239.4
Lipid Metabolism	63.5	548.8
Dietary Fiber	14.2	122.7
Minerals	12.0	103.7
Blood Pressure Related	8.8	76.1
Oligo Saccharides	6.7	57.9
Cholesterol Related	11.4	98.5
Total:	567.9	4,908.4

Source: Japan Health Food and Nutritional Food Association

B. PRODUCTS NOT PRESENT IN SIGNIFICANT QUANTITIES BUT WHICH HAVE GOOD SALES POTENTIAL

1. Organic Foods

While still a niche market, the demand for organic products is steadily increasing. As a result of the recent establishment of organic standards in the U.S. by USDA and agreement with Japan on certification procedures for organic products exported to Japan, the opportunity for organic products will expand in the future. Competition for the organic market will come from Australia and New Zealand among others.

This applies to not only raw products such as fresh or frozen vegetables but also for processed items like pasta sauce as well.

2. Beverages/Wine

Flavored teas, coffees, juices and related waters are becoming more popular in Japan.

Wine is also expected to continue to grow in the future as less hard liquor is consumed. California and other West Coast wines can participate in this growth with good marketing strategy. However, the competitive marketing from other producing areas including France, Italy, Australia and Spain has been intensifying.

3. Ethnic Foods

The popularity of ethnic foods is expected to continue to grow and with it the market for ingredients. Tex-Mex products are one example. Wrap sandwiches featuring flavored tortillas are also beginning to appear in the marketplace. Asian cuisines including

Vietnamese, Thai, and Korean Foods are getting increasingly popular. Japanese food manufacturers have developed, for example, special condiments for Korean spicy dishes for use in both home cooking and food service. Also many Italian food items such as spaghetti sauce, olive oil, and pasta have become regular items even for home cooking and consequently, Japanese food manufacturers have developed a variety of ready-to-use spaghetti sauces in recent years. Pizza chains such as Pizza Hut and Domino's have been successful in expanding the market for pizza. The U.S. is a major supplier of meat toppings as well as tomato based pastes and crust.

4. *Frozen Dough, Desserts, and Baking Goods*

Frozen dough and cookie products have been growing in recent years. Bagels are also becoming better known in Japan. More recently, scones have increased in popularity after being introduced by Starbucks and are now on the menu of other fast food chains and in convenience stores. Cheesecake desserts also offer opportunity.

5. *Substitutes for Beef Flavorings and Gelatins*

Because of the BSE problem in Japan, many Japanese food processors using beef as a base for flavorings or in gelatin form have switched to substitutes. Types of products using such flavorings in Japan include snack items such as potato chips, and seasonings for broths and soups.

6. *Other*

Other items with potential for increased sales include the following products:

Processed meats such as pre-cooked bacon and sausages that are microwavable have the potential for growth with foodservice groups such as hotels. Turkey is a product traditionally unfamiliar in Japan, but has made inroads by its introduction by companies such as Subway Japan. Smoked turkey legs are also a very popular item in Tokyo Disneyland and are getting widespread exposure as a result. Likewise, the expansion of Western style coffee shops (e.g. Starbucks, Seattle's Best, Tully's, etc.) has presented opportunities for deli meats, cheese, soup and pastries.

C. PRODUCTS NOT PRESENT BECAUSE THEY FACE SIGNIFICANT BARRIERS

1. *Items containing prohibited ingredients or excess of allowable limits*

Because of the strict Japanese regulations on food additives, some U.S. food products containing prohibited additives or excess amount of allowable limits cannot enter Japan. It is highly recommended that U.S. exporters check their product compliance as a first step when considering business in Japan.

2. *High Tariff Rate Products/Quota Restricted Items*

A variety of dairy products such as butter, edible non-fat dry milk and whey products, yogurt and other dairy products are subject to TRQ/high tariffs. Likewise, sugar, and rice face very high tariff rates. It is wise to check the tariff rates as well as quota

restrictions for your classification of product. Quotas still exist on some items such as dry beans.

3. *Quarantine Restricted Items*

Numerous fresh produce products are prevented from entering Japan due to the Japanese plant quarantine regulations. For example, fresh potatoes are prohibited to import. The list for prohibited produce items can be obtained from APHIS, Tokyo as well as through ATO offices in Japan.

Despite the presence of barriers in some categories, most food products can be imported to Japan as evidenced by the fact that Japan is the largest net food importer in the world among developed countries.

V. POST CONTACT AND FURTHER INFORMATION

For those with questions or seeking additional assistance, please contact the U.S. Agricultural Trade office (ATO) in Tokyo or Osaka or the Agricultural Affairs office at the following addresses:

ATO Tokyo	Toshin Tameike Bldg. 8F. 1-1-14, Akasaka, Minato-ku, Tokyo 107-0052 Tel: 81-3-3505-6050 Fax: 81-3-3582-6429 E-mail address: atotokyo@usda.gov
ATO Osaka	American Consulate General 2-11-5, Nishi Tenma, Kita-ku, Osaka City, Osaka 530-8543 Tel: 81-6-6315-5916 Fax: 81-6-6315-5906 E-mail address: atoosaka@usda.gov
Agricultural Affairs, American Embassy, Tokyo	1-10-5, Akasaka, Minato-ku, Tokyo 107-8420 Tel: 81-3-3224-5102 Fax: 81-3-3589-0793 E-mail address: agtokyo@usda.gov

FAS offices in Japan also issue periodic reports on the Japanese food industry and specific product categories. Please visit the ATO Japan home page at <http://www.atojapan.org/market.html>.

Note: It is recommended that U.S. exporters verify relevant import requirements with their foreign customers, who normally have the most updated information on local requirements, prior to exportation. Final import approval of any product is subject to the importing country's rules and regulations as interpreted by border officials at the time of product entry.